

Live Exports and the Australian Community 2025

A National Program of
Community Sentiment Research

November 2025

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Voconiq, Our story

Voconiq is an Australian data science company built on a platform of research developed by Australia's national science agency, CSIRO. The Voconiq founding team spent 11 years in CSIRO building this science platform, engaging over 70,000 community members in 14 countries to understand what leads to deeper trust between industries, companies and governments, and the communities they work alongside. Founded in 2019, Voconiq was created as a vehicle for delivering this science as a service globally. Voconiq is the home of Engagement Science and we are passionate about giving voice to communities large and local about the issues that matter to them and helping those that work alongside them to listen to community voices effectively.

To learn more, go to www.voconiq.com

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Acknowledgements

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This research has been conducted by Voconiq, an independent data science company.

Introduction

Australia's live export industry plays an important role in the nation's agricultural economy and livestock market. It connects Australian producers with overseas markets in ways that align with the cultural, economic, and technological needs of trading partners. The industry supports rural and regional livelihoods, contributes to Australia's reputation as a reliable exporter, and underpins relationships that extend well beyond the sale of livestock.

At the same time, live export remains one of the most closely scrutinised areas of Australia's agricultural sector. Over the past decade, it has attracted sustained public attention and debate driven by its visibility, ethical considerations, and the importance Australians place on animal welfare. This scrutiny has persisted even as mortality rates remain consistently low and the regulatory framework governing live export has become increasingly robust.

Now in its fifth year, this national study builds on a series of surveys that began in 2019 to track how Australians understand, trust, and accept the live export industry. Each survey has explored public sentiment on issues such as animal welfare, regulation, governance, industry responsiveness, and the industry's economic and social impact. Together, this dataset provide one of the most comprehensive and consistent views of community attitudes toward live export in Australia.

Australians continue to recognise the live export industry as an important part of the agricultural landscape. Over time, community sentiment has strengthened around the view that live exports make a valuable economic contribution to the nation and to farming communities. The majority of Australians also continue to see livestock production, including live exports, as an integral part of Australia's agricultural identity. These results demonstrate enduring recognition of the industry's value, and of the farmers and regional economies it supports.

This program has measured community trust and acceptance as the two key indicators of the industry's social licence to operate. Trust reflects the confidence Australians have that the industry acts with integrity, humanity, and competence. Acceptance represents the extent to which Australians consider the industry's operations appropriate and legitimate. Together, they offer a clear view of how the live export industry's relationship with the Australian community has been evolving over time.

Using advanced modelling techniques, this research examines how these views have changed over time and what conditions strengthen or weaken trust in the industry. In 2025, Australians have continued to recognise the value that live exports bring to farmers, regional economies, and trading partners. Regulation, animal welfare, and industry responsiveness remain the strongest influences on community trust, with confidence in these areas closely linked to acceptance of the industry's role. The treatment of animals during transport and perceptions of industry practice continue to be defining factors in shaping this relationship.

This research has been made possible by the support of the Livestock Export Program, a jointly funded collaboration between LiveCorp and Meat & Livestock Australia. Together, these industry partners have committed to understanding and reflecting the views of the broader community. Their investment in this work underscores the importance of grounding industry practices and informing discussions for decision makers in transparent, inclusive and data-informed engagement.

The research process

Year five of the research program built on the findings of previous surveys, and investigated the nuances that made up Australia's attitude towards the live export industry. Year one saw the collection of baseline data. Years two and three were focused on examining how responses changed following the first initial survey. We conducted two surveys in year four: the annual anchor survey and a smaller pulse survey to understand real-time issues. This year, we continued to build on these findings through a robust research process described below.

Consistent with previous years, an online survey methodology was used to access the views of Australians over the age of 18 years, with a research panel used to ensure a representative sample by age and gender. Participants were recruited across the country between 24 July and 20 August 2025. 4,635 surveys were included for analysis after data cleaning¹. Responses were analysed and used to create a path model to understand what drives trust and acceptance of the live export industry.

Each annual survey has been conducted approximately 18 months apart, allowing for comparison over time. This report includes data from each previous survey to gauge how community attitudes have changed year to year.

Measures that have been asked prior to 2024 draw on responses from each annual anchor survey, and not the 2024 pulse survey, which gauged community attitudes to live exports at a particular point in time. Where measures introduced in the pulse survey have been repeated, it is the reference point. To read more about the pulse survey responses, see the Live Exports and the Australian Community 2024 report, available on the Livecorp website.

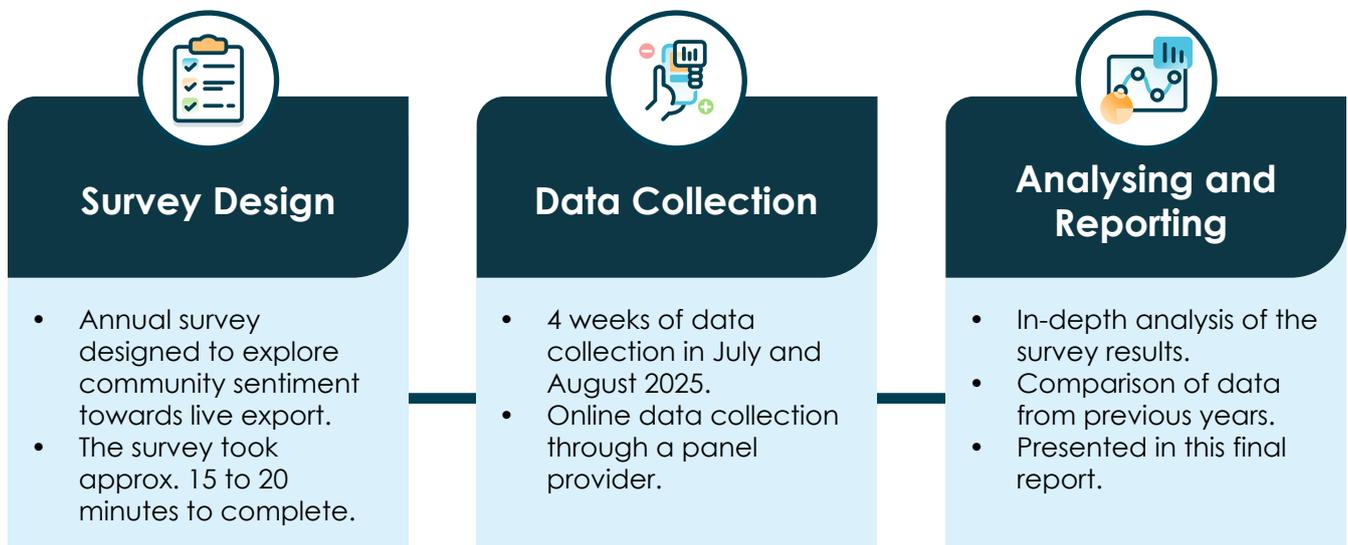


Figure 1. Research process overview.

¹ 'Data cleaning' is conducted in order to ensure the quality of data included in analyses is high. This involves screening and potential removal of surveys where, for example, participants answered the survey very quickly (i.e. less than 5 minutes), in ways that indicate lack of attention to the content of questions, and extreme or consistent responding on survey questions (i.e. answering '1' to all questions). For more detail on what this involves, see Meade AW and Bartholomew C. (2012) Identifying careless responses in survey design. *Psychological Methods*, 17(3), 437-455. DOI: 10.1037/a0028085.

What did we measure?

In line with previous surveys, year five examined the Australian community's sentiment towards the live export industry and value chain. There are multiple sources of animals, routes to foreign markets, and purposes that animals bred in Australia are used for in overseas markets. In addition, Australia's live export industry operates within various regulatory frameworks and often overlaps with other agricultural industries. The survey instrument was designed to capture as much nuance as possible.

All surveys within the program have begun with a detailed introduction and consent process.

Being able to track sentiment over time is a key value point of the program, so many of the same questions have been included each year. Participants in year five were asked a comprehensive set of demographic questions, as well as on the following topics²:

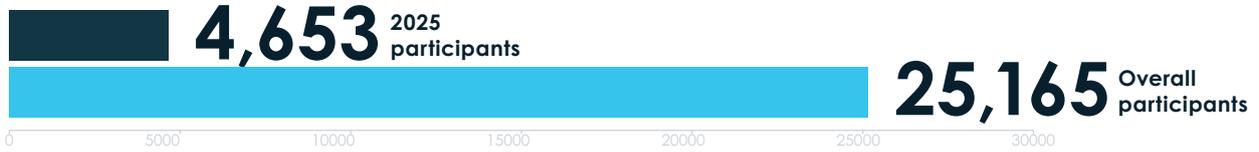
- Information sources
- Different parts of the live export process
- Animal welfare
- Governance and regulation
- Economic impact and value proposition
- Industry responsiveness
- Trust in the industry
- Acceptance of the industry

Each year, additional questions have been included as focus topics determined by relevant industry context at the time of collection or to dig deeper on participant responses from the previous year. Participants were also encouraged to make freeform comments at the end of the survey, and a selection of these comments are included throughout this report.

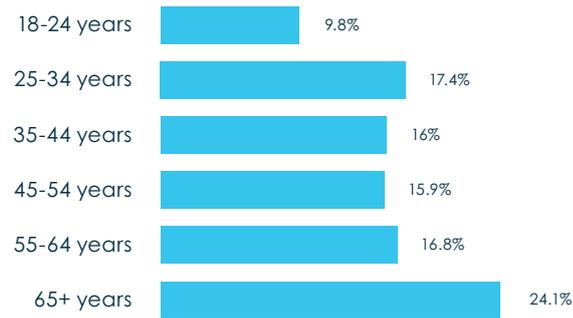
Participants were provided with a clear definition of the live export industry at the beginning of the survey: The live export industry is defined as the export of live cattle, sheep, and goats to overseas markets for meat and breeding purposes.

²Most topics were measured using 5-point Likert type agreement scales, where 1 = Strongly disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly agree. When reporting, categories may be combined to express "agreement" (combining results of Agree and Strongly agree) and "disagreement" (combining results of Disagree and Strongly disagree).

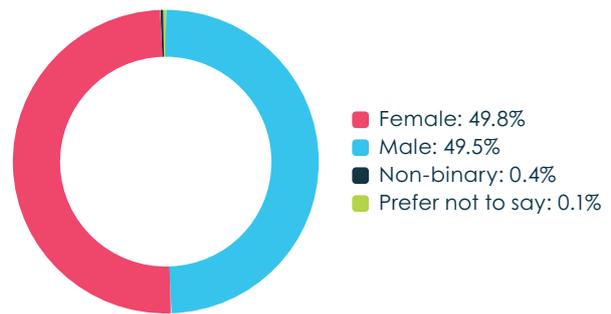
Who completed the 2024 national surveys?



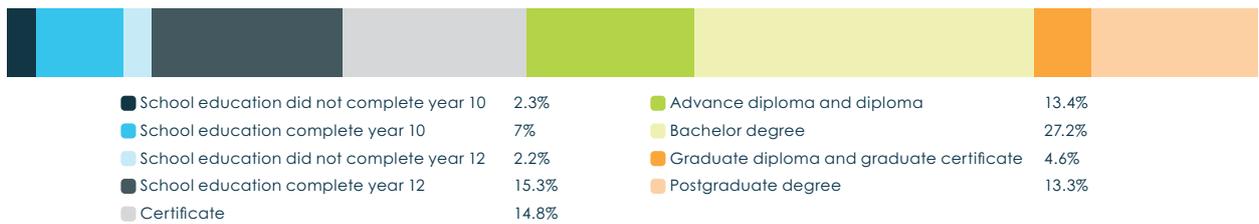
Age of participants



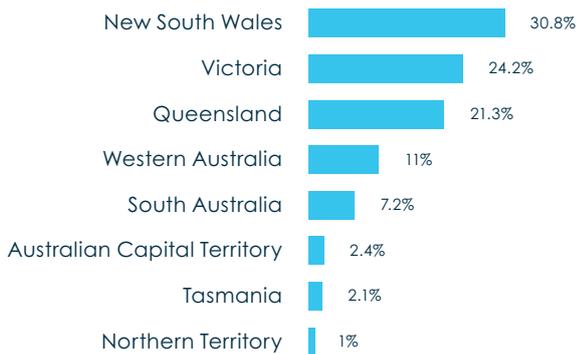
Gender



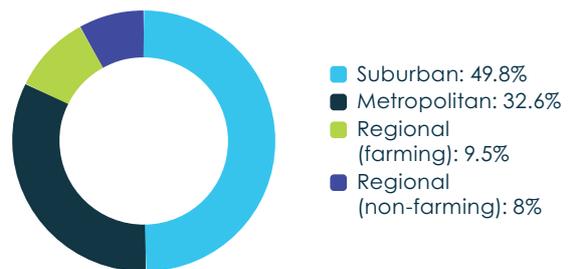
Highest level of education



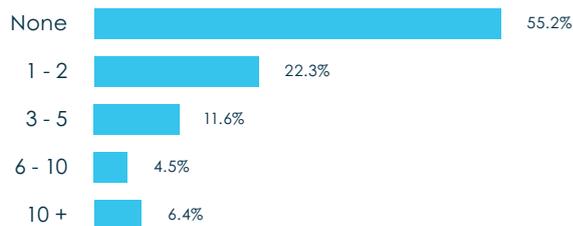
Location



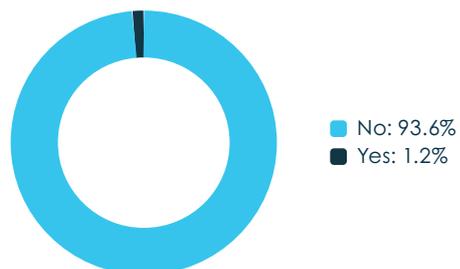
Region



People known in industry



Aboriginal/Torres Strait Islander



Community trust and acceptance

Understanding the relationship between the Australian community and the live export industry, and the industry’s social licence to operate, rests on two key measures: trust and acceptance. Social licence reflects the extent to which the industry meets community expectations and is therefore regarded as legitimate and appropriate. Trust is a core relational factor underpinning social licence, while acceptance serves as a practical indicator of it.

Measured on a scale from 1 ('not at all') to 5 ('extremely'), the average level of trust in Australia's live export industry was 2.99 in 2025. As shown in **Figure 2** below, trust experienced a small decline in 2024 and returned to similar levels from previous years, indicating stability over time. On the same scale, acceptance of live exports scored 3.14 in 2025, a notable improvement on the previous year. It represents a statistically significant increase of 0.25 since the 2019 baseline, where acceptance was rated at 2.89 (Figure 2).

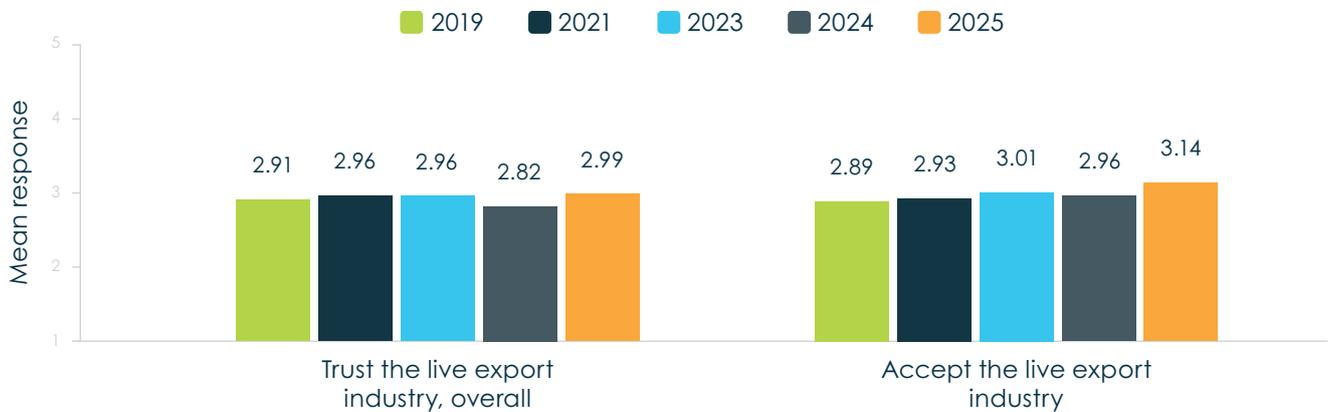


Figure 2: Mean ratings of trust and acceptance of the live export industry, 2019-2025.

2024 was the first time we investigated how the community viewed the different trust domains of humanity, integrity and competence. Trust in these domains grew between 2024's anchor and pulse surveys, and remained stable in 2025. The domain that received the highest rating was the competency measure of "trust the Australian live export industry to be the best at what they do" at 3.14 (Figure 3). A similar rating was given for the integrity measure "trust the Australian live export industry to act responsibly" at 3.10 (Figure 3). The community gave the humanity measure, "trust the Australian live export industry to value the needs and desires of people like me" a score of 2.91 (Figure 3).

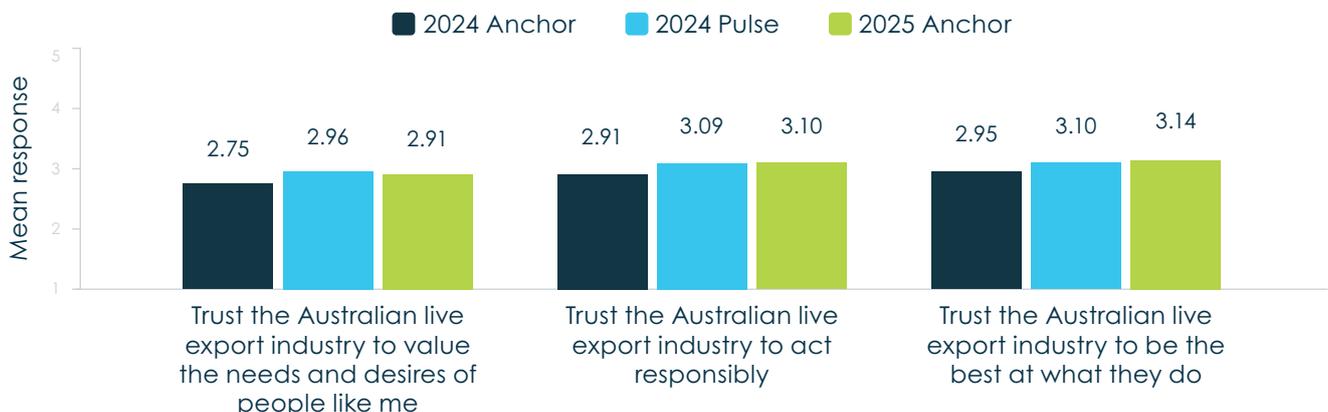


Figure 3: Mean rating of trust domain measures, 2024-2025.

Drivers of trust and acceptance

Each year, this research provides valuable insights into the issues that drive community trust and acceptance. This is conducted via a statistical technique called path modelling, which allows us to predict the strength of each issue or set of measures and their influence on trust and acceptance. **Figure 4** below shows the 2025 path model for the live export industry. Drivers of trust this year, from most to least influential, include regulation, animal welfare and industry responsiveness. All relationships were positive such that higher scores on each driver lead to higher levels of trust in the industry. Trust is the strongest driver of acceptance, our proxy for social licence to operate. Drivers of acceptance this year, independent of trust, include a respondent's moral position on animal export and the treatment of animals during live export. Both acceptance drivers are negative, such that the more the Australian community agree with these statements, the less they accept the live export industry.

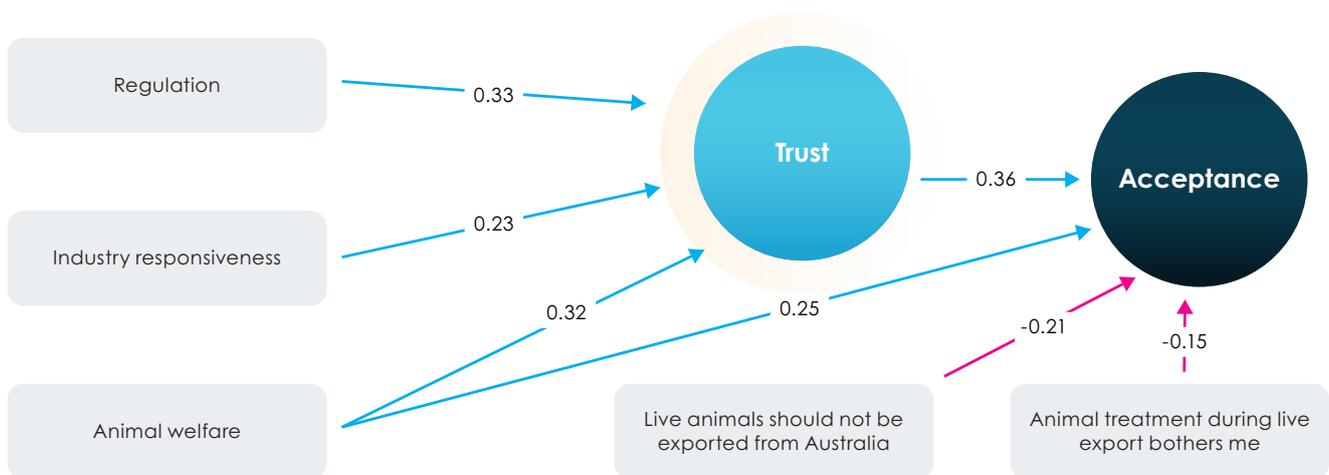


Figure 4: A stylised diagram of the acceptance path model for Australia's live export industry, 2025.

How to read this path model

Path modelling is a statistical technique that is used to analyse the relationships between multiple variables, and to understand how those variables are connected. Those variables are then identified as drivers of community trust and acceptance and help in understanding the underlying patterns of how community members think what they do and why. Path modelling begins with a determination of how each item included in the survey relates to one another. Smart clustering techniques are used to find the similar patterns within these relationships. These patterns are translated into drivers of trust through by a machine learning algorithm called 'random forests' that is able to predict the level of influence these patterns have on trust and acceptance. The final path model output puts drivers in competition with one another and 'prunes' them until only the strongest drivers of trust and acceptance remain. Path models provide organisations with the knowledge of where to pinpoint efforts in strengthening their relationship with their community.

When reading the path model on this page, follow the arrows from left to right. The direction of the arrow indicates the direction of the relationship (e.g. trust leads to acceptance). The numbers on the arrows denote their importance in predicting the measure they point at: higher numbers represent stronger relationships. Blue arrows represent positive relationships between measures (e.g. regulation leads to increased trust) and red arrows represent negative relationships between measures (e.g. agreement that animal treatment during live export bothers me leads to decreased trust). Most pathways in this model are positive.

Community views towards Australia’s live export industry

A key aim of this program is to understand the relationship between the live export industry and the broader Australian community. Industry performance and the social context in which it operates is central to understanding the value Australians attribute to live exports, their economic impact and contribution to community.

The Australian community have continually recognised the live export industry as playing an important role in Australia. Agreement with this sentiment has grown since the initial baseline survey in 2019 (Figure 5). The portion of those who 'agreed' or 'strongly agreed' to the statement "The live export industry makes an important economic contribution to Australia" was 80.2% in 2025, compared to 78% in 2024 (Figure 5). There is continued recognition that the industry makes an important economic contribution to farming communities that produce export livestock, with 79.3% who agreed in 2025, a 5.7% increase from the 2019 baseline of 73.6% (Figure 5). Additionally, when asked if "the livestock industry (i.e. for meat) is an important part of the agricultural industry in Australia" 88.5% of participants agreed (Figure 5), underscoring the recognition community members hold for the live export industry and the farmers who participate in meat production.

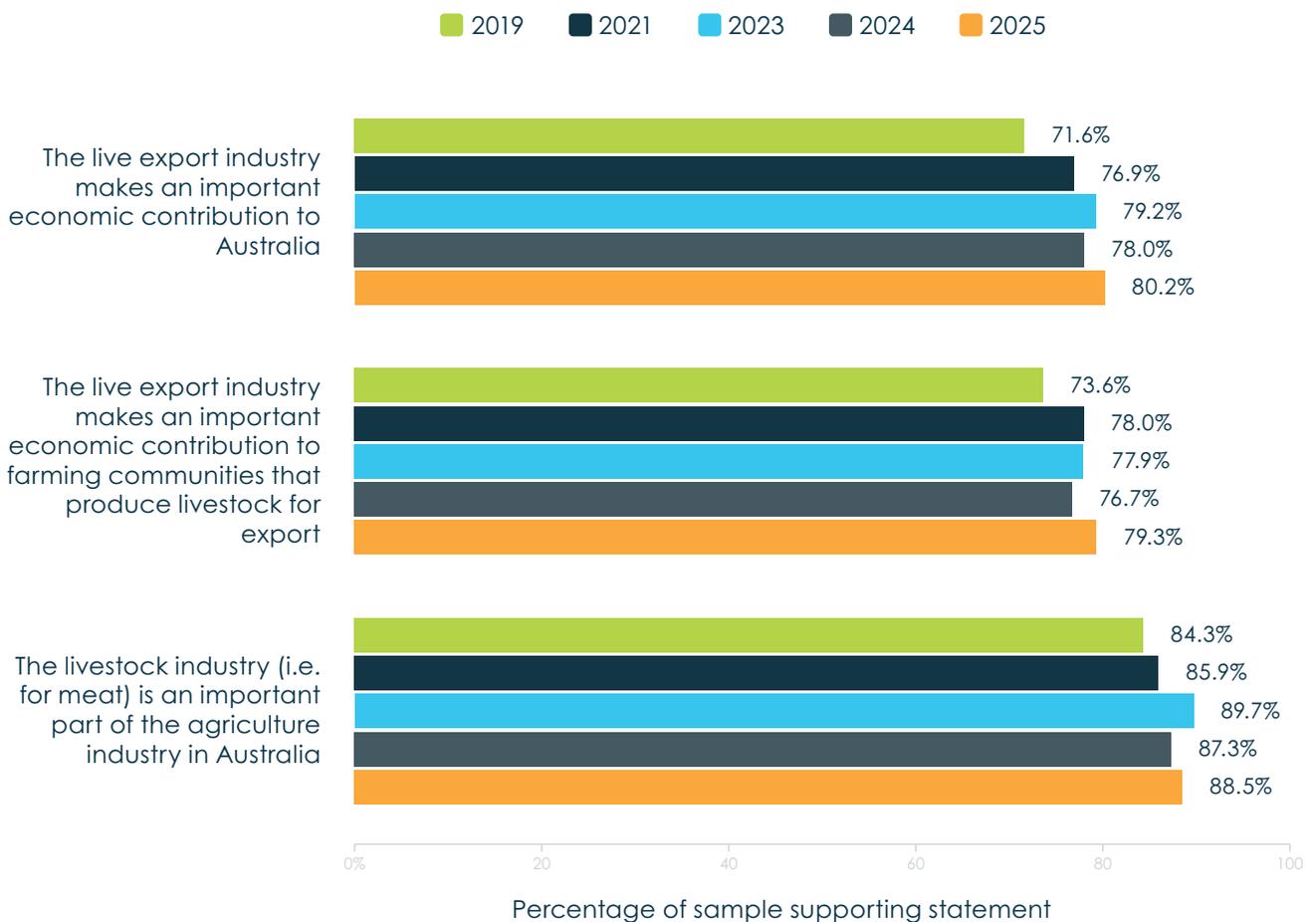


Figure 5: Proportion of agreement the live export industry plays an important role in Australia, 2019-2025.

What did the community say about the live export industry?

“ It should be continued for the benefits of both producers and the countries exported to.
– 2025 farming region survey participant.

“ We should not export livestock but if we do, [they] should be taken care of.
– 2025 suburban survey participant.

“ I hope it has improved since the last shipment I saw on TV when animals were left in terrible heat. I hope the countries they are exported to treat the animals better.
– 2025 farming region survey participant.

“ We need to ethically export animals.
– 2025 metropolitan survey participant.

“ I believe that the live sheep and cattle [export] is essential for the Australian economy, and equally as important for the livelihood of our farmers.
– 2025 suburban survey participant.

“ Live export is an essential trade for any country. If the export demand for Australian sheep, etc, is high, that reflects on the good quality of Australian stock.
– 2025 metropolitan survey participant.

Regulation and governance

Community confidence in external regulation of an industry is critical, particularly when that industry, like live exports, is responsible for the welfare of animals. In 2025, regulation was the strongest driver of community trust in the live export industry. For community members, accountability mechanisms provide confidence that policies, processes and standards are being met. In turn, they also provide assurance that consequences of breaching these rules are enforced. When regulation and governance are effective, it signals to the community that their interests are being protected.

The majority of Australians agreed that they "don't really know how the live export industry is regulated" (55%; Figure 6), but most agreed that "standards developed for the live export industry ensure people in the industry do the right thing" (54%; Figure 6) and that regulators are able to hold the industry accountable (51%; Figure 6). These majority agreement responses demonstrate that the community has confidence in the underpinning regulatory mechanisms, even if they don't have much knowledge about the specifics of live export regulation. The community were in strong agreement that "individuals in the live export industry who break the rules should be held accountable rather than the industry as a whole" at 79% (Figure 6), a new measure introduced this year.

Over time, community sentiment has shown that people see regulation and standards as essential for holding the live export industry accountable. From the beginning of the research program through to the 2024 anchor survey, confidence in these areas steadily declined. However, results from the 2024 pulse survey showed signs of improvement (Figure 7). In 2025, agreement that "regulators of the live export industry are able to hold the industry accountable" appears to have stabilised (51% agree or strongly agree, 34% neutral) after the sharper decline seen earlier (down 13% from 2019 to 2024). Meanwhile, agreement that standards developed ensure people in the industry do the right thing increased by 4.7% since last year's pulse survey, suggesting a gradual return to pre-2024 levels of confidence (Figure 7).

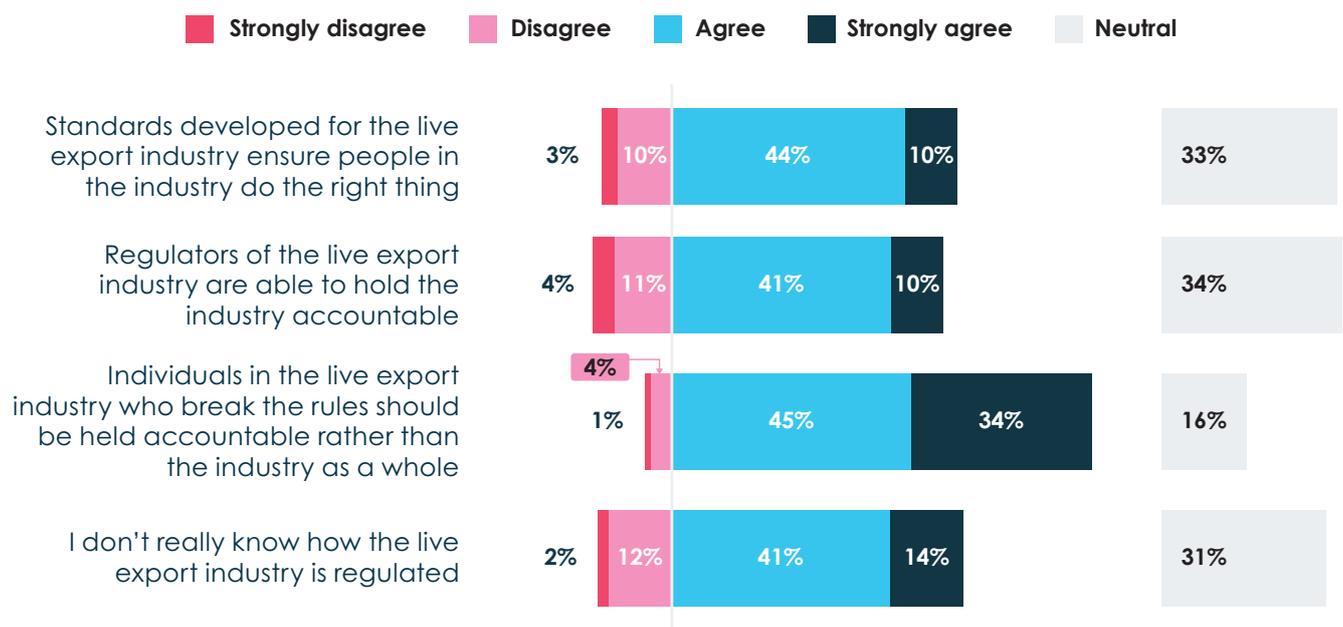


Figure 6: Distribution of response to regulation measures, 2025.

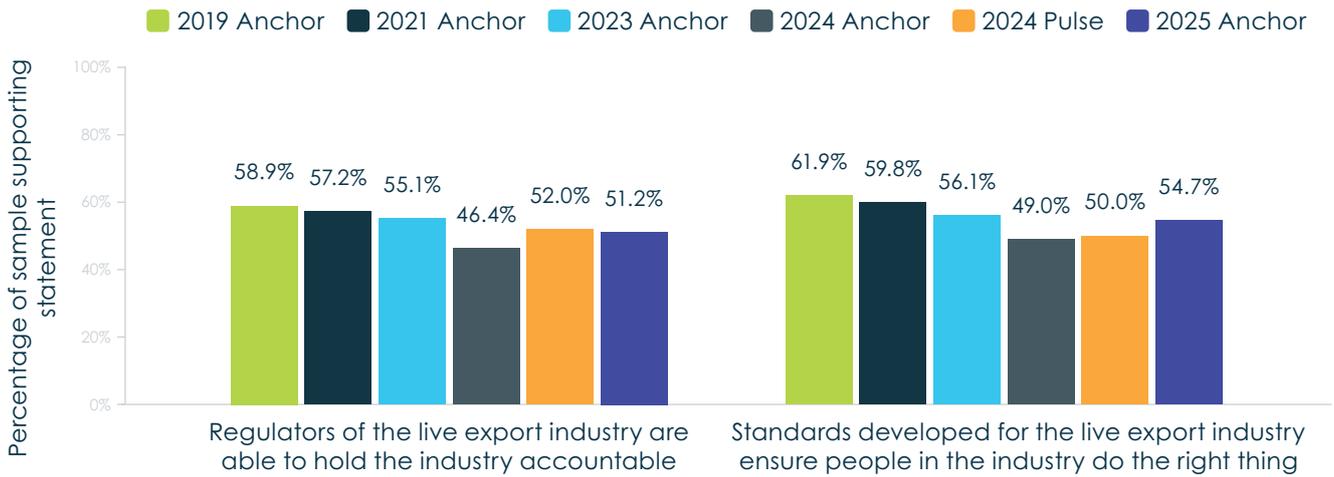


Figure 7: Proportion of agreement on regulation measures, 2019-2025.

In 2025, we also asked a series of targeted questions about regulation of live sheep exports to gauge how the community perceived sheep export in comparison to livestock more generally. Similar to the industry as a whole, more than half of participants agreed that they "don't really know how the live sheep export industry is regulated (Figure 8) but have demonstrated that they have confidence in regulatory mechanisms despite this. When asked if "regulators of the live sheep export industry are able to hold the industry accountable" 47% agreed, while 49% agreed to the statement "standards developed for the live sheep export industry ensure people in the industry do the right thing" (Figure 8). Neutral responses for both of these measures were 38% (Figure 8), reflecting some uncertainty regarding regulation.

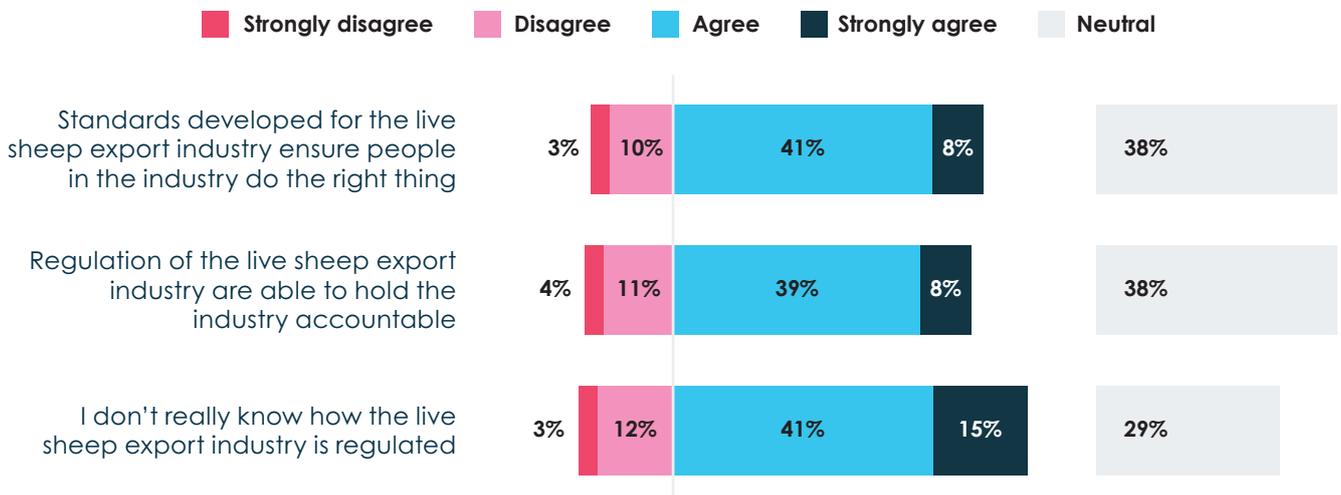


Figure 8: Distribution of response on live sheep export regulation measures, 2025.

Australians continue to view effective regulation and clear accountability as central to their trust in the live export industry. The steady recovery in confidence suggests that maintaining strong governance and transparently communicating regulatory performance remain vital to sustaining that trust.

Animal welfare

The welfare of animals has been a central topic in the national discussion of the live export industry in Australia since the program began, and we have explored how Australians think and feel about it from multiple points of view. This year, animal welfare was the second strongest driver of community trust and importantly, a key driver of acceptance reflecting the importance of meeting welfare standards to the community.

Australians continue to recognise that animal welfare is a complex issue within the live export industry. In 2025, 74.3% agreed that the topic is complex (18% neutral, 7% disagreed; Figure 9), and a similar proportion (71.2%) agreed that “the welfare of animals is not just about the absence of harm to them” (24% neutral, 5% disagreed; Figure 9). These findings show that the Australian community understands that animal welfare involves more than preventing harm. This perspective has remained consistent across previous years of the program.

Confidence in the live export industry's approach to animal welfare also strengthened this year, although there remains some uncertainty. Nearly half of participants (47.4%) agreed that “Australian animals are treated appropriately in the Australian live export industry” (37% neutral, 15% disagreed; Figure 9), the highest level of agreement recorded in any anchor survey to date and a clear increase from 41.5% in 2024. Similarly, 50.5% of Australians expressed confidence that the industry is taking effective action to ensure the welfare of animals (Figure 10).

More than half of respondents (55%) said they would like to be kept informed about what the live export industry is doing to ensure animal welfare, highlighting the community's desire for transparency and ongoing engagement (Figure 10). 46% of participants also indicated confidence in the industry's ability to ensure the welfare of animals during transport (33% neutral).

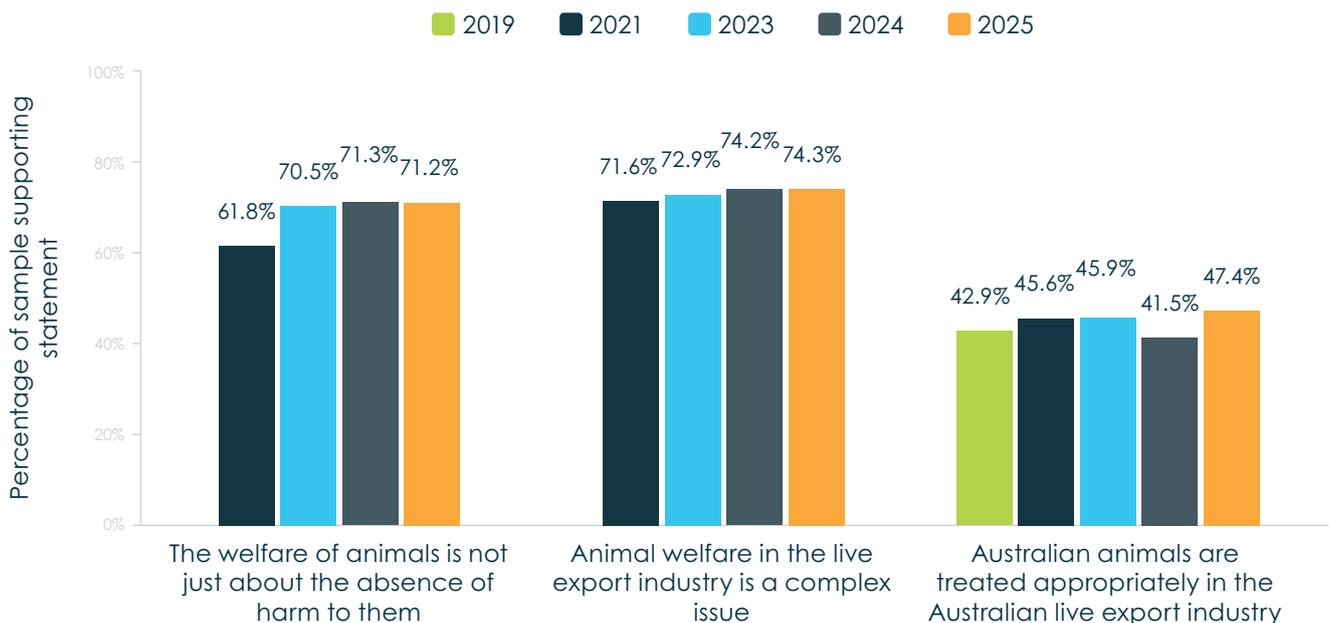


Figure 9: Proportion of agreement on animal welfare measures, 2019-2025.

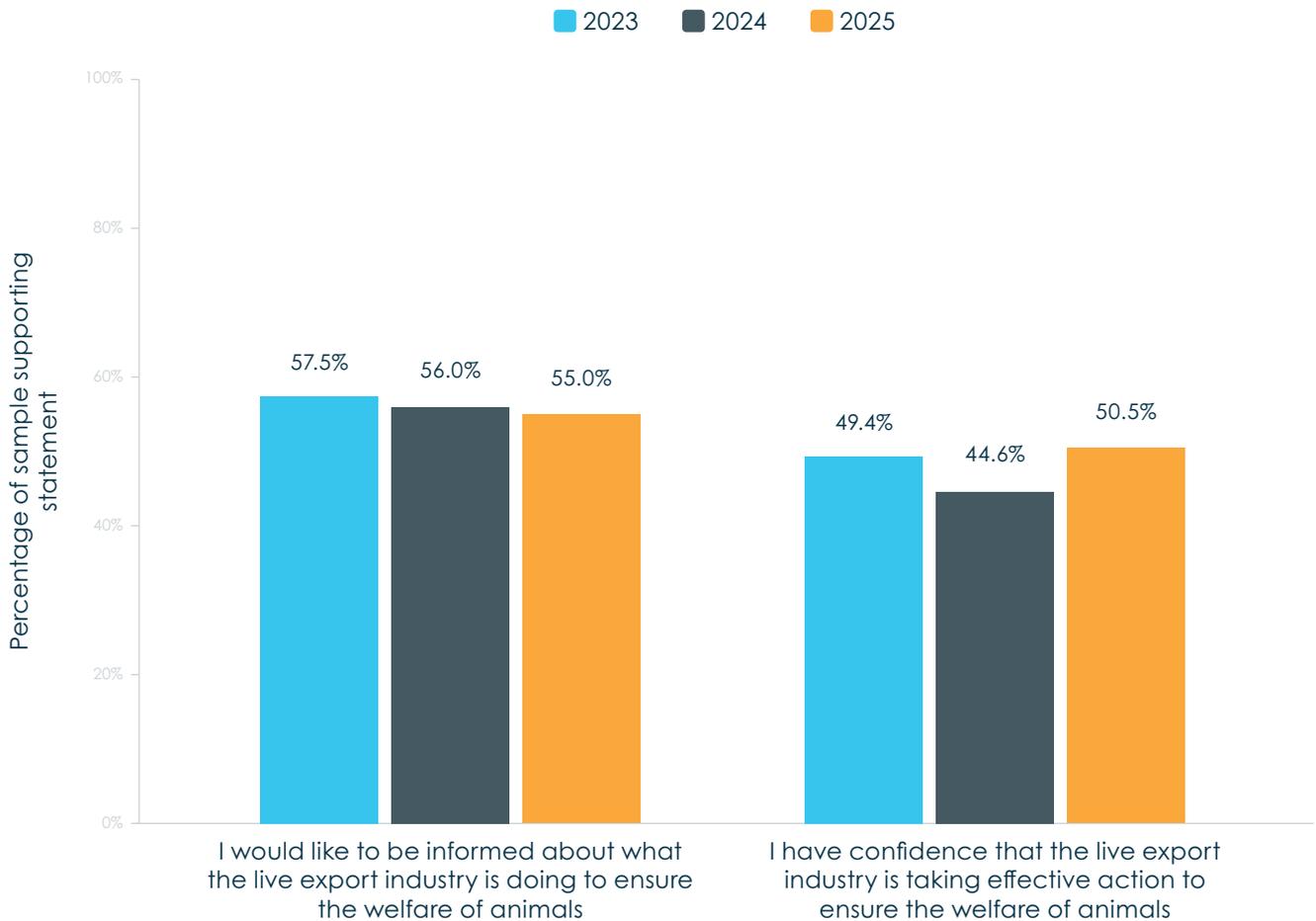


Figure 10: Proportion of agreement on confidence in animal welfare measures, 2023-2025.

Animal welfare during the export journey

Concerns about animal welfare during the export journey remain a key consideration for the Australian public. This year, animal welfare during transport appeared as a driver of both trust and acceptance, indicating that community expectations in this area are fundamental.

Fewer than half of participants agreed that the way animals are transported to overseas markets (44%), transported after arrival (43.3%), or slaughtered overseas (44%) “really bothers them” (Figure 11). These proportions have decreased since the 2024 pulse survey, suggesting a softening of community concern. While it is lower, there is still concern about welfare in Australia, showing just how important animal welfare is to all livestock industries: 24.9% agreed that “the way animals are slaughtered in Australia really bothers me,” and 29.9% agreed that “the way animals are transported within Australia really bothers me,” down from 41.7% in 2024 (Figure 11).

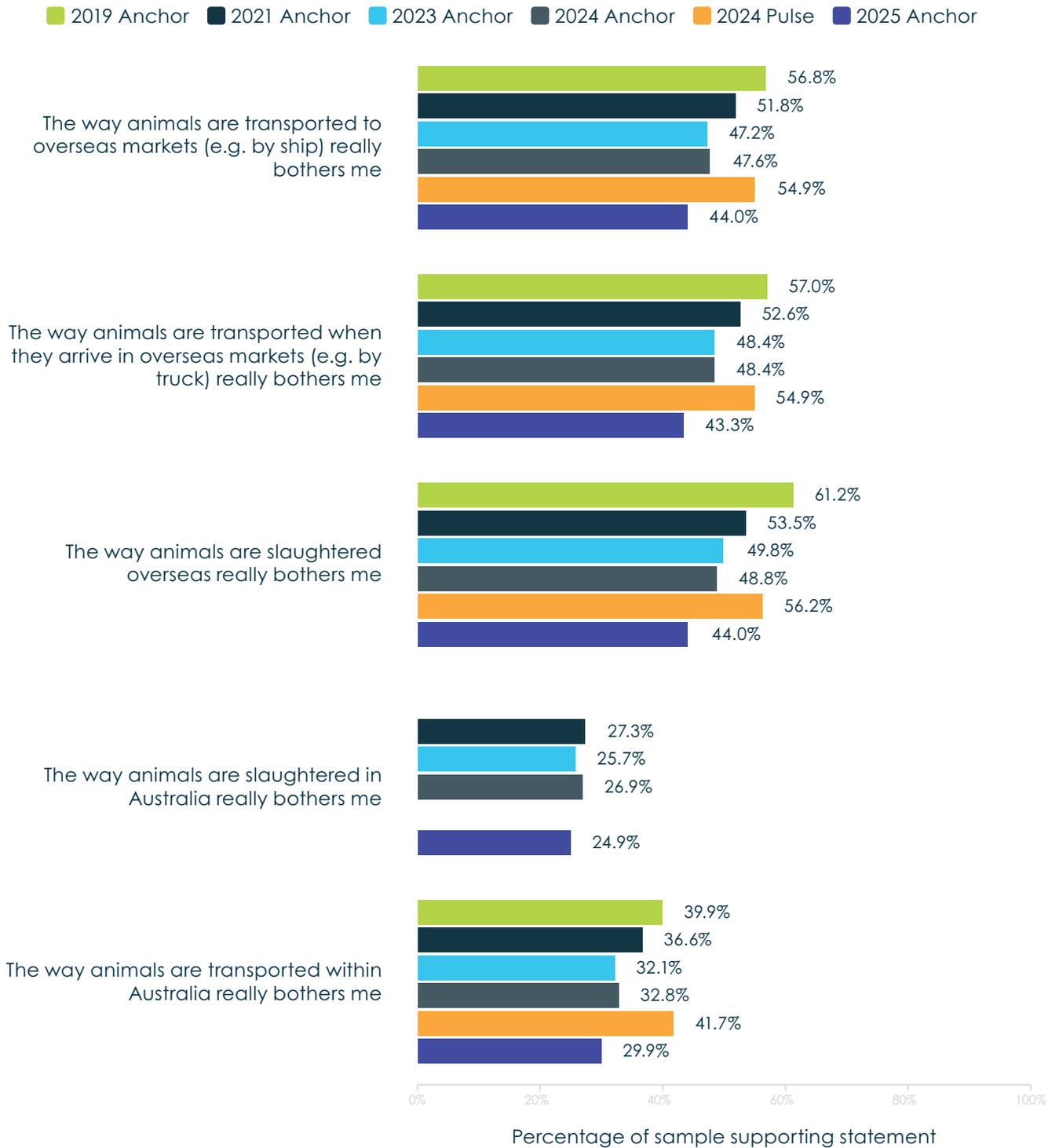


Figure 11: Proportion of agreement on supply chain measures, 2025.

Sentiment towards the overall practice of live export has also become more moderate. Agreement with the statement "Australia should stop the export of live animals to overseas markets, regardless of the impacts on Australian farmers" declined to 26.3% in 2025, the lowest recorded level in the program (Figure 12). Nearly half of Australians (48%) disagreed with the same statement (Figure 13). A similar pattern was observed for the statement "It doesn't matter to me if there is overseas demand for live animals, we shouldn't export them from Australia" where agreement decreased to 29.3% (Figure 12). Together, these results suggest that negative perceptions of live export are easing and that public views are becoming more balanced.

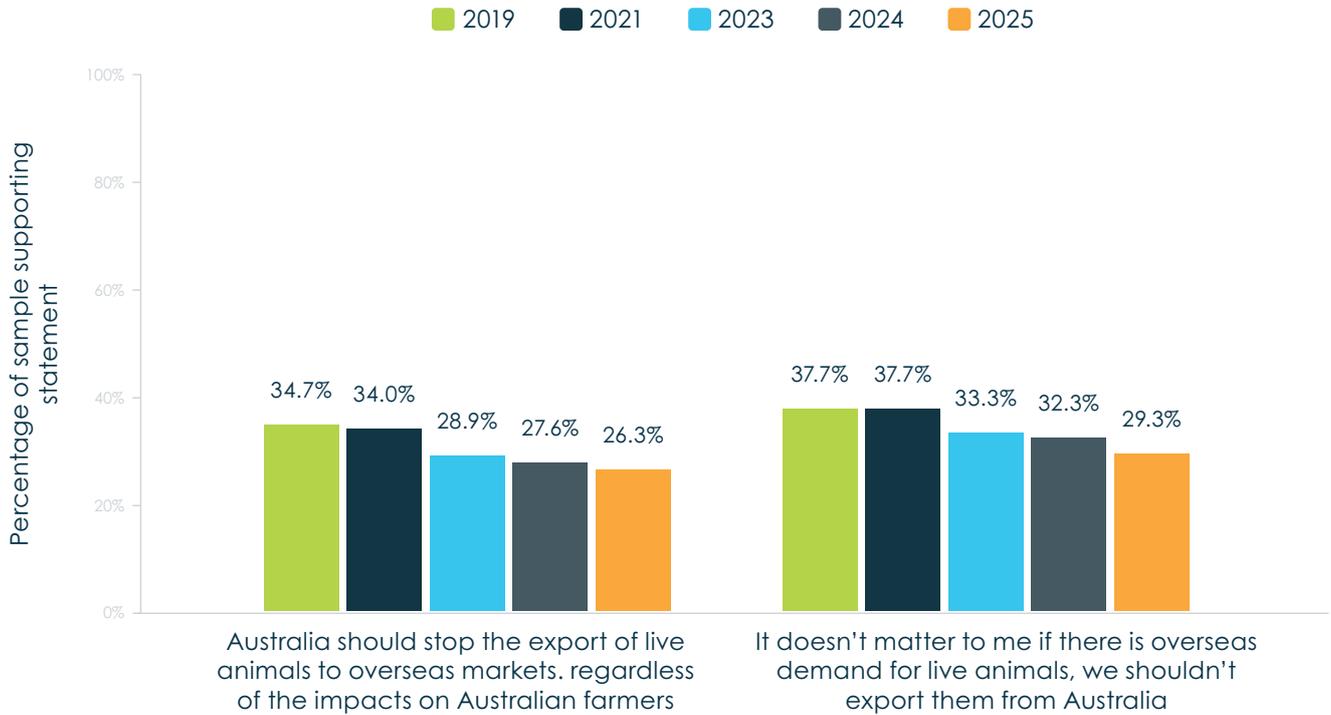


Figure 12: Proportion of agreement on stopping live export measures, 2019-2025.

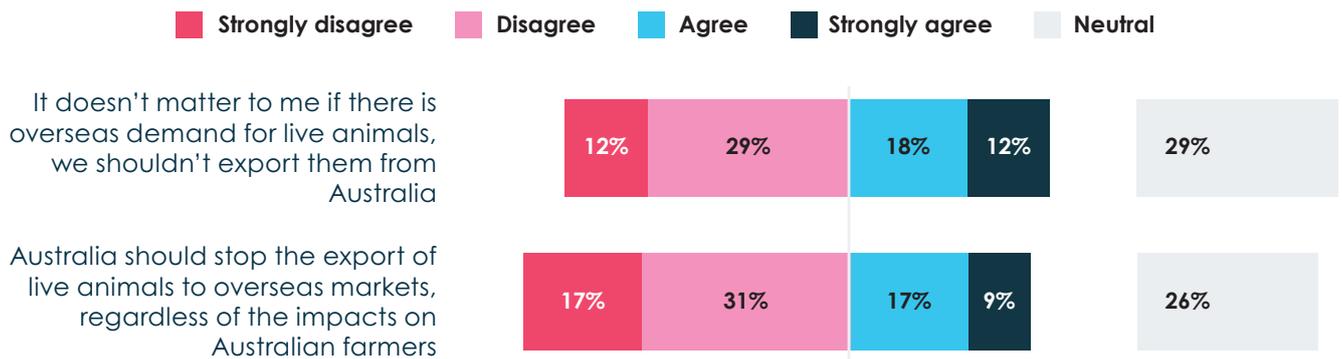


Figure 13: Distribution of responses to stopping live export measures, 2025.

Community knowledge about animal treatment during live export remained limited. The majority of Australians agreed that they "don't really know how animals are treated on live export ships" (56.7%) or "when they arrive at their destination" (68.5%; Figure 14). However, perceptions of conditions appear to be improving. Agreement that "conditions for animals on live export ships are not in line with Australian welfare standards" decreased to 37.2%, while agreement that "animals on live export ships receive appropriate veterinary care on their journey" increased to 36.3% (Figure 14). Neutral responses remain high across these measures, reflecting continued uncertainty and a need for accessible, reliable information.

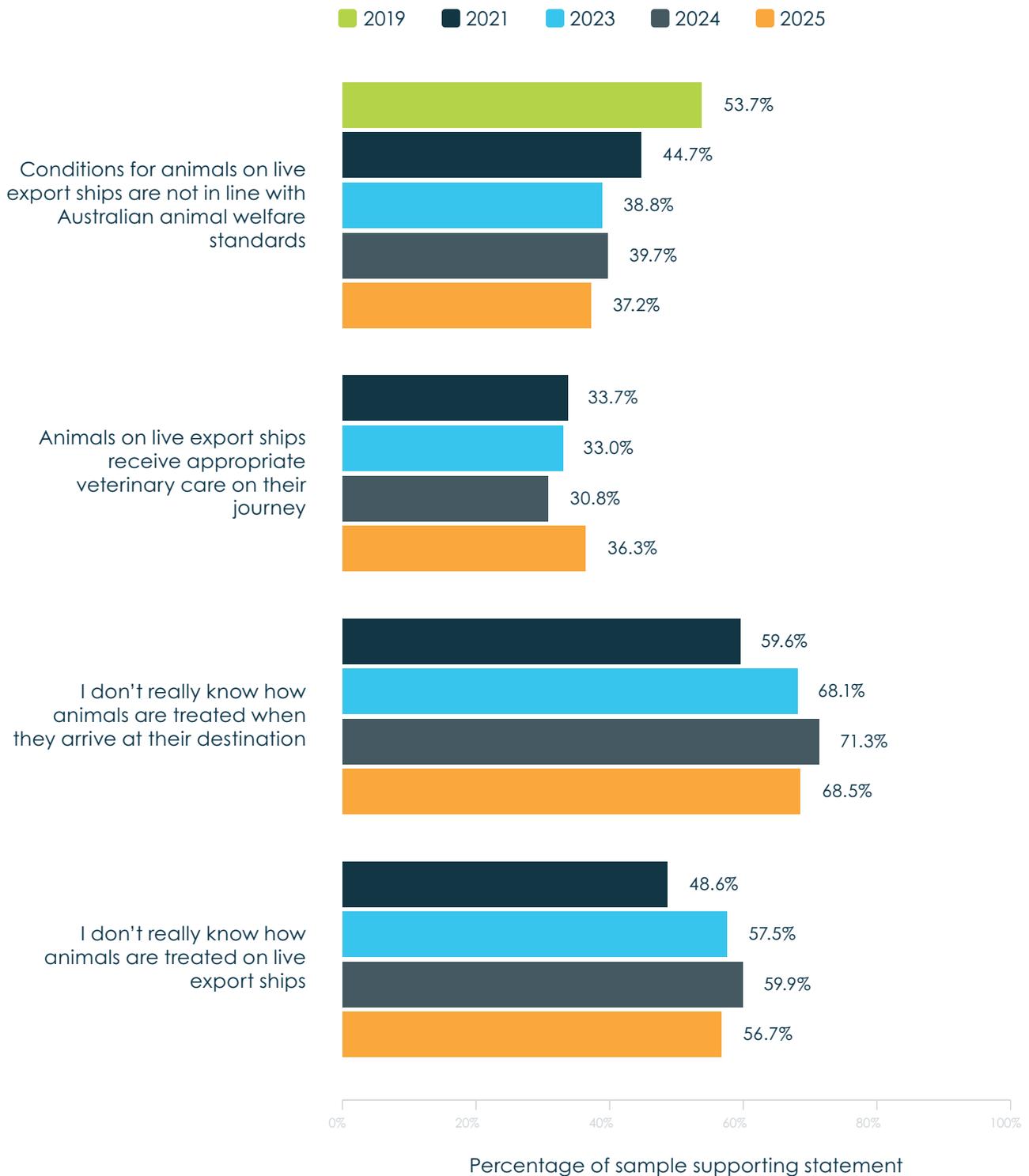


Figure 14: Proportion of agreement on live export animal treatment measures, 2019-2025.

When asked to rate specific concerns about the live export journey by sea, Australians were most concerned about access to fresh air (mean rating 3.68), followed by food and water availability (3.67), and maintaining temperature control (3.58; Figure 15). New areas of concern introduced in 2025, such as noise and lighting levels, handling during loading, and weather conditions, received moderate concern ratings.

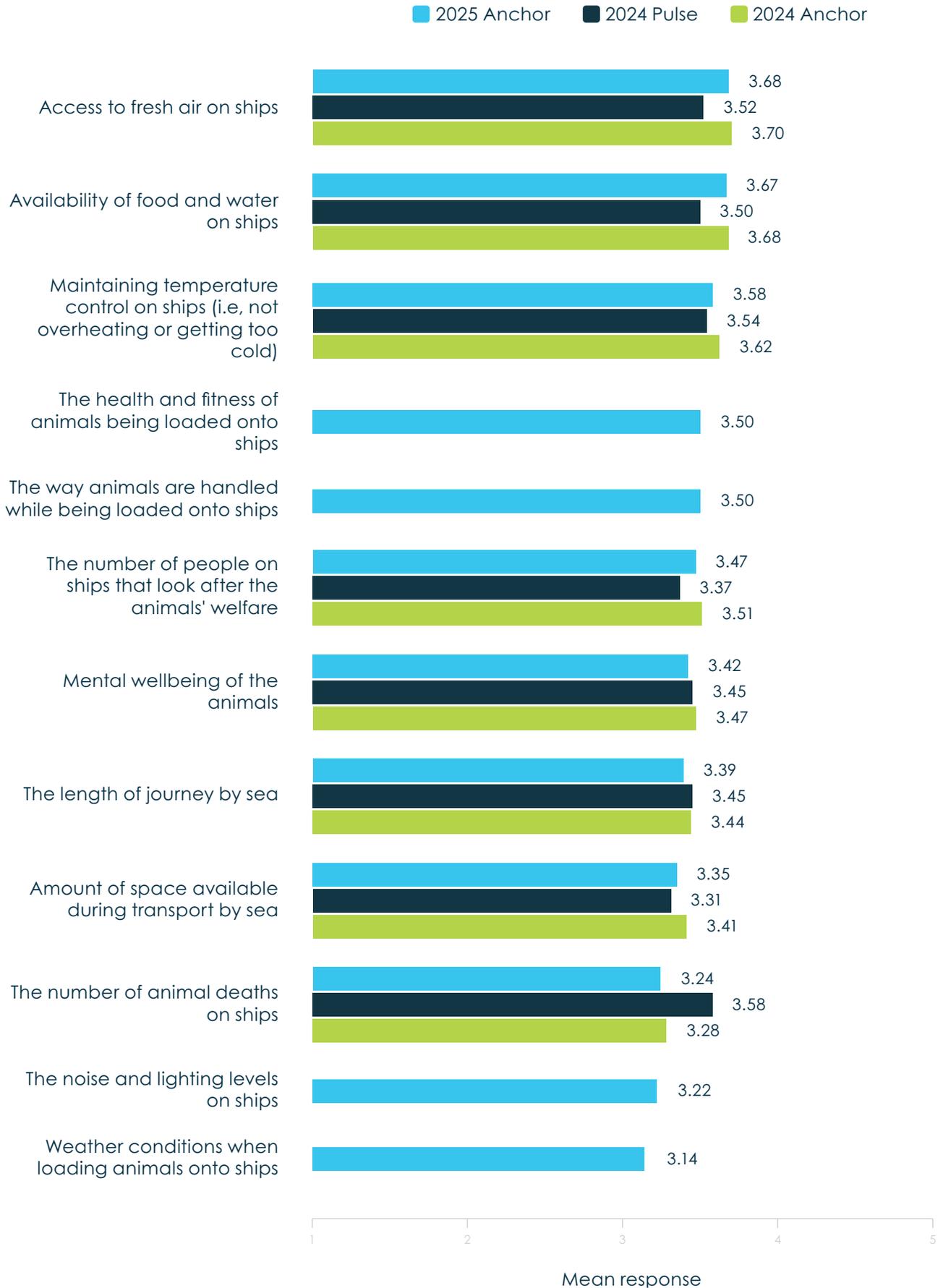


Figure 15: Mean ratings of shipboard concern measures, 2025.

Having identified in early surveys that the live export journey by sea is a key area of concern for the community, this program has continued to investigate the community's knowledge and expectations around shipboard mortality rates.

When asked whether "the average number of live export deaths is acceptable to me," 35.6% of participants agreed, an increase of 3.4% from last year's pulse survey (Figure 16). Meanwhile, 37.9% agreed with the statement "it doesn't matter to me how many animals die on a live export voyage, one death is too many" (Figure 16). As expected, as agreement with the statement about acceptability increased over time, agreement with the opposing view, that even one death is too many, has decreased.

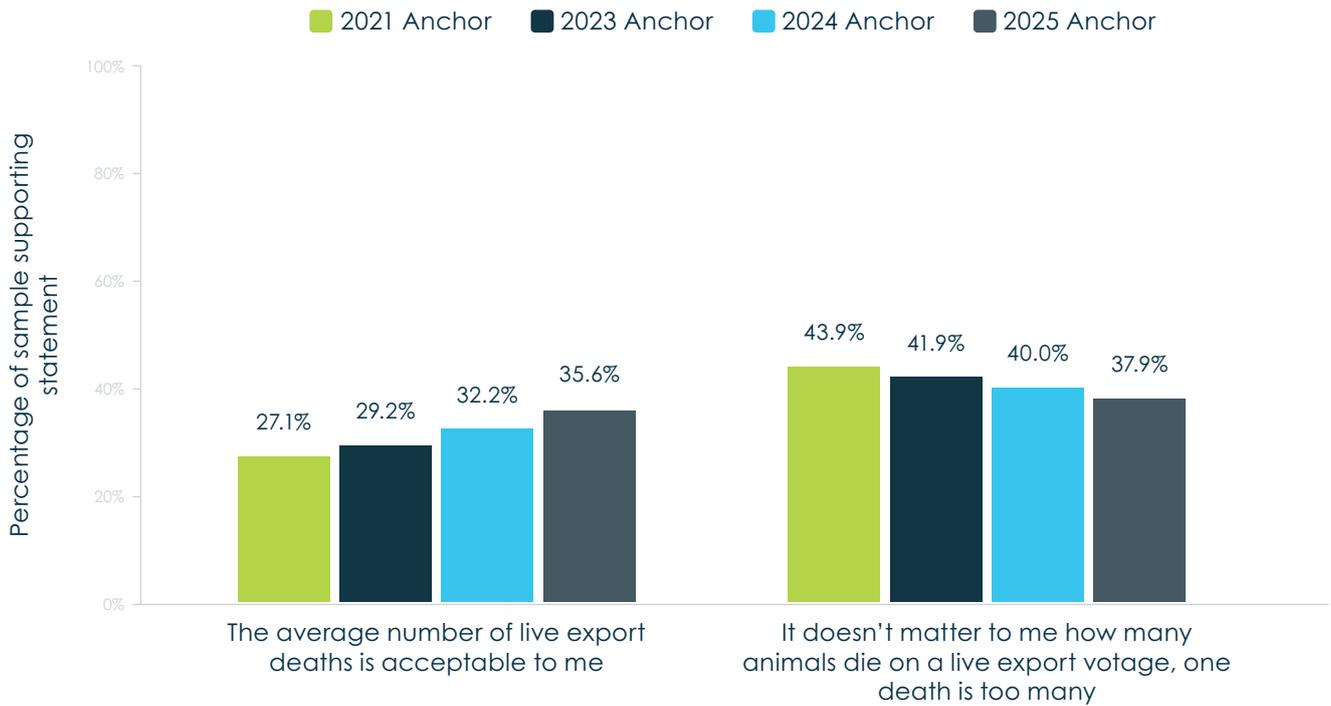


Figure 16: Proportion of agreement on shipboard mortality measures 2021-2025.

Participants were then shown official statistics from the Australian Government Department of Agriculture, stating that in 2022, 10 in every 10,000 sheep and 6 in every 10,000 cattle transported overseas by ship died while in transit. They were asked to rate how these figures compared with their expectations on a five-point scale from 1 ('much lower than expected') to 5 ('much higher than expected'). More than half of respondents (51%) thought the number was lower or much lower than expected, while almost one-third (32%) said it was about what they expected (Figure 17). These findings indicate that mortality rates are lower than expected. Live exports may want to consider how they are communicating about mortality rates to create a more informed community.

According to the Australian Government Department of Agriculture, 10 in every 10,000 (ten thousand) sheep and 6 in every 10,000 (ten thousand) cattle transported overseas by ship in 2022 died while in transit. Are these figures

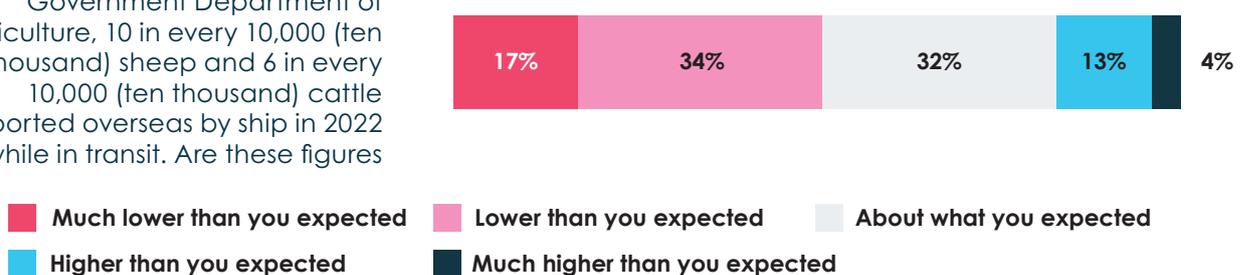


Figure 17: Distribution of response to expectations of shipboard mortality rates, 2025.

Animal welfare in overseas markets

Perceptions of animal welfare standards in destination markets continued to evolve. Agreement with the statement “the treatment of exported animals in overseas markets is not in line with Australian welfare standards” has declined from 61.7% in 2019 to 46.2% in 2025, suggesting that Australians' perceptions of overseas standards are increasingly improving (Figure 18). Confidence in the industry's contribution to that improvement is also rising, with 48.3% of participants who agreed that “the live export industry exports animal welfare know-how and technology as well as livestock,” an increase of 3.5% since last year (Figure 18).

Australians recognised the broader benefits of live exports for food security and breeding outcomes. Two-thirds (66%) agreed that “exporting breeding stock to overseas countries helps ensure their own food security,” and 45% said they are “more comfortable with live export when animals are sent overseas for breeding rather than meat production” (Figure 19).

A similar portion at 40% responded neutrally (Figure 19), indicating some uncertainty within the community.

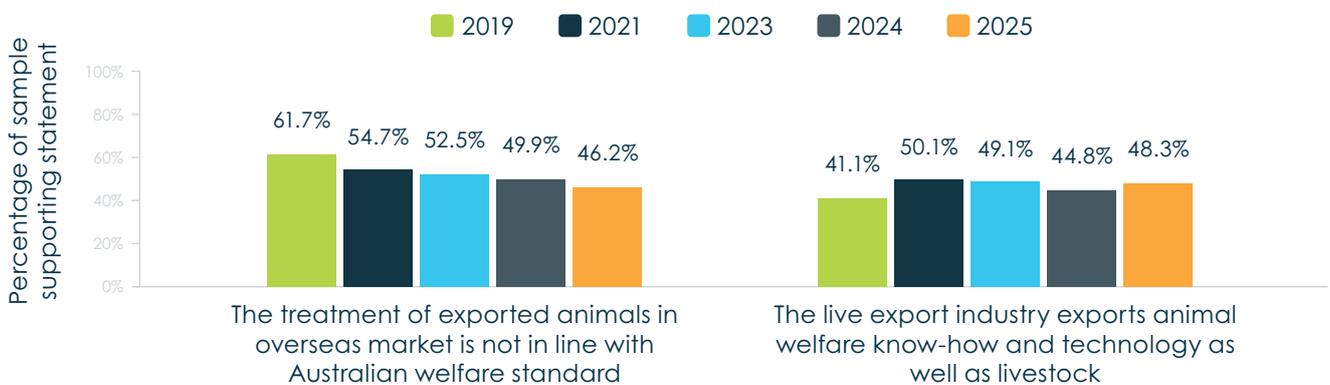


Figure 18: Proportion of agreement on animal welfare in overseas markets measures, 2019-2025.

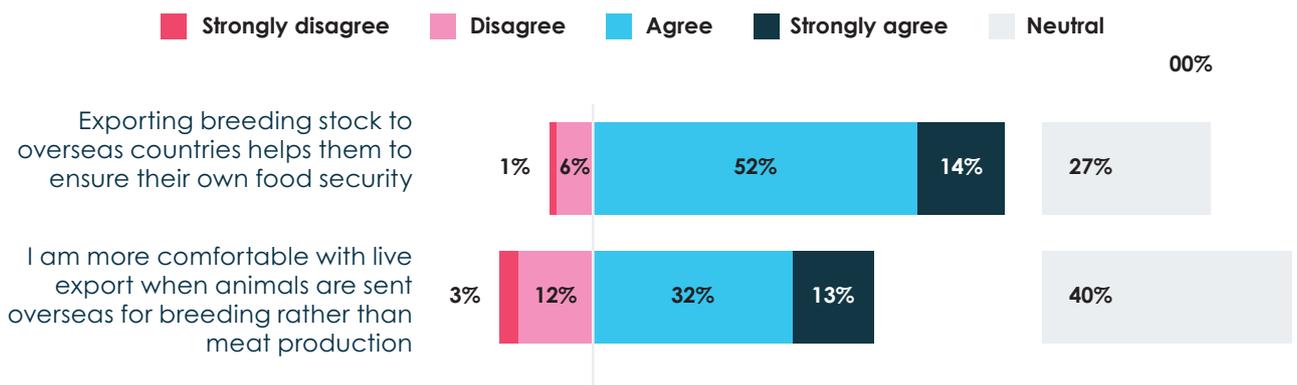


Figure 19: Distribution of responses to live export animal purpose measures, 2025.

Views about Australia's influence on overseas welfare practices are mixed but trending positive. In 2025, 59.9% agreed that “applying Australian animal welfare standards to our animals when sold overseas improves welfare standards in those countries” the highest recorded level of agreement in the program (Figure 20). Close to half of all survey participants agreed that Australia's live export industry has improved the standard of livestock management and slaughter in overseas markets at 46.1%, also the highest recorded level of agreement since 2019 (Figure 20). Over a third agreed (36.9%) to the statement “a ban on live exports from Australia would mean animal standards would decline in overseas countries” (Figure 20).

LIVE EXPORTS AND THE AUSTRALIAN COMMUNITY

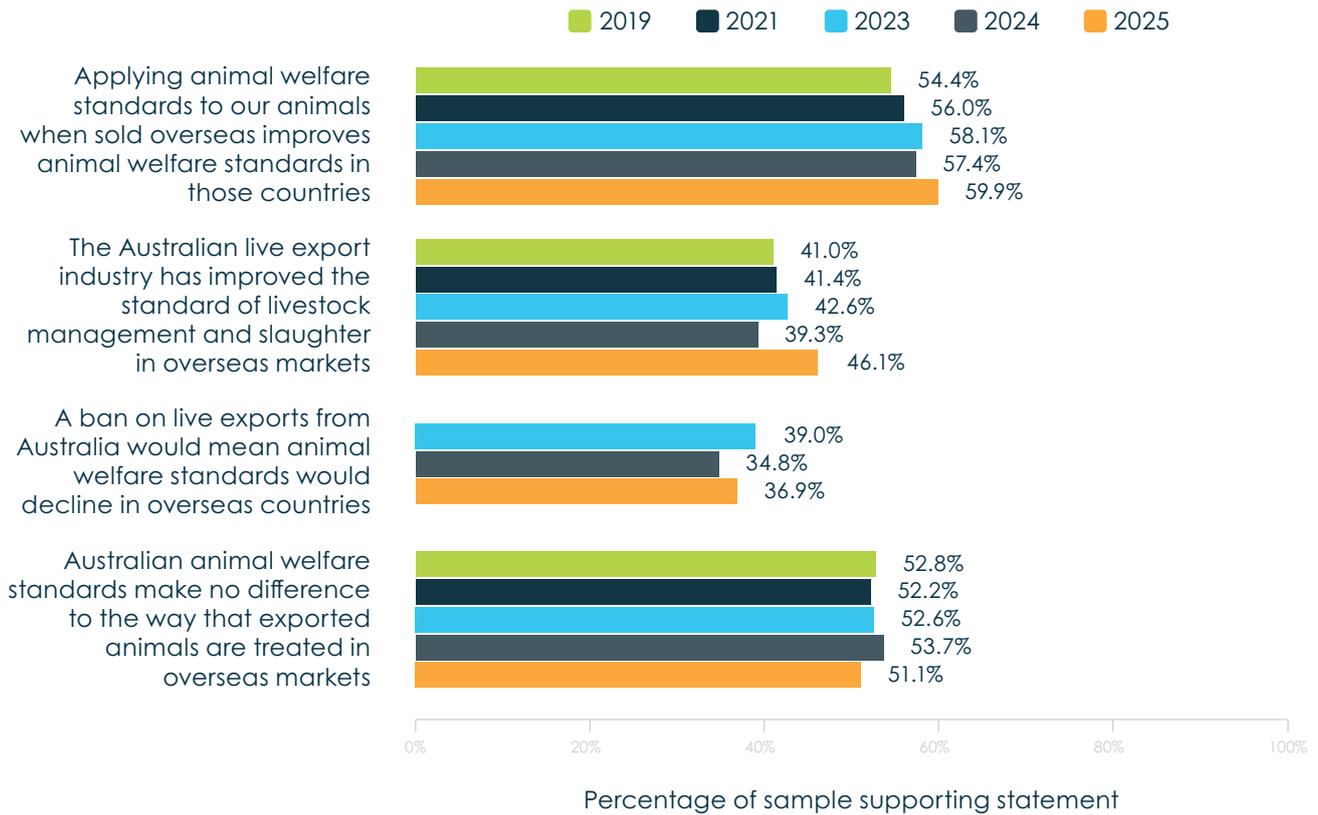


Figure 20: Proportion of agreement on impact of Australian animal welfare standards in overseas markets, 2019-2025.

New cultural awareness questions were included in 2025. A large majority of participants (86%) agreed that "different countries have different practices around animal slaughter based on cultural or religious traditions" and most agreed that they "don't need to know how animals are killed in overseas markets, just that it's done humanely" (65%, Figure 21). However, community members believed that it can be done, with two-thirds (66%) who agreed that "welfare standards can be maintained across different slaughter methods and religious practices" (Figure 21).

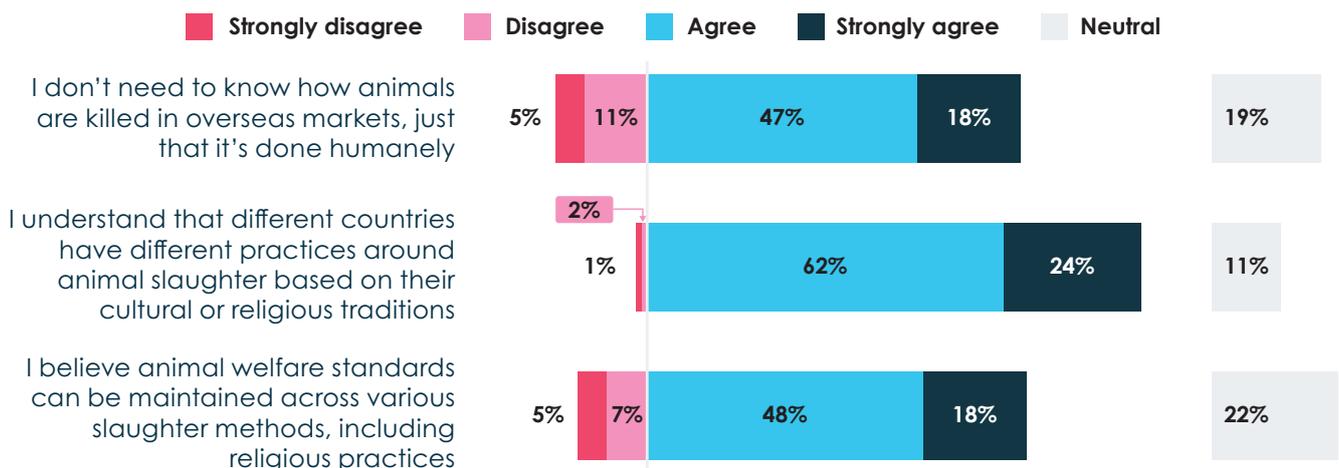


Figure 21: Distribution of responses to overseas market culture measures, 2025.

These results indicate that Australians increasingly recognise the live export industry's performance on animal welfare, while maintaining clear expectations for continued transparency, accountability, and care for animals throughout the supply chain.

What did the community say about animal welfare?

““ *The industry needs to ensure [that] animal welfare is a priority.*

– 2025 suburban survey participant.

““ *It's hard for me, I understand both sides, the need to export and the animal welfare issue. I'm stuck in the middle of the entire situation.*

– 2025 farming region survey participant.

““ *I do believe that over the past 10 years animal welfare within the live export to overseas markets has improved immensely. Yes some animals still die, that is going to be difficult to totally stop, animals still die on properties through floods, accidents and you are never going to stop this completely either.*

– 2025 metropolitan survey participant.

““ *I see the economic benefits of the live export industry and understand the impact that the closure of the industry will have. But I am greatly troubled by the welfare of animals being shipped overseas.*

– 2025 suburban survey participant.

““ *It is a challenging issue. I have no doubt standards have improved substantially in recent years, but it has taken outrage at events involving significant animal suffering to prompt that change and greater regulation. Greater transparency of data - say, regularly publishing fatality rates - may alleviate concerns, especially if fatality rates from transport within Australia was provided as a comparison.*

- 2025 metropolitan survey participant.

Industry responsiveness

Responsiveness of the live export industry to community concern has consistently been identified as one of the strongest drivers of community trust in this program of work, and ranked third in 2025. Responsiveness is fundamental to an industry’s social licence to operate and is a consistent predictor of trust across various sectors. This year, the community have continued to recognise an ongoing effort by the live export industry to be responsive.

Industry responsiveness is measured by two core items:

- The extent to which the industry is perceived to listen to and respect community opinions
- The extent to which the industry is seen to be willing to change its behaviour based on those community concerns.

Scores on both responsiveness measures saw a substantial gain in the 2024 pulse survey (Figure 22). While agreement has declined slightly this year, it is still above levels seen in past surveys. Neutral scores have been high over time and may indicate an opportunity for the industry to increase the visibility of its responsiveness to the Australian community more broadly.

This year, when asked if "the live export industry is prepared to change its practices in response to community concerns", 41% agreed, with 42% neutral and 17% who disagreed (Figure 23). Fewer people agreed that "the live export industry listens to and respects community opinions" at 36% (41% neutral, 22% disagreed; Figure 23).

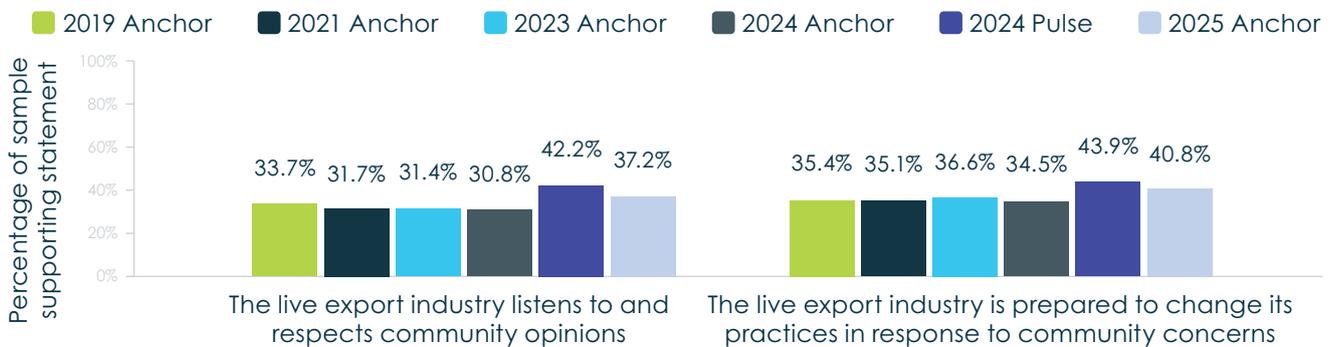


Figure 22: Proportion of agreement on responsiveness measures of the live export industry, 2019-2025

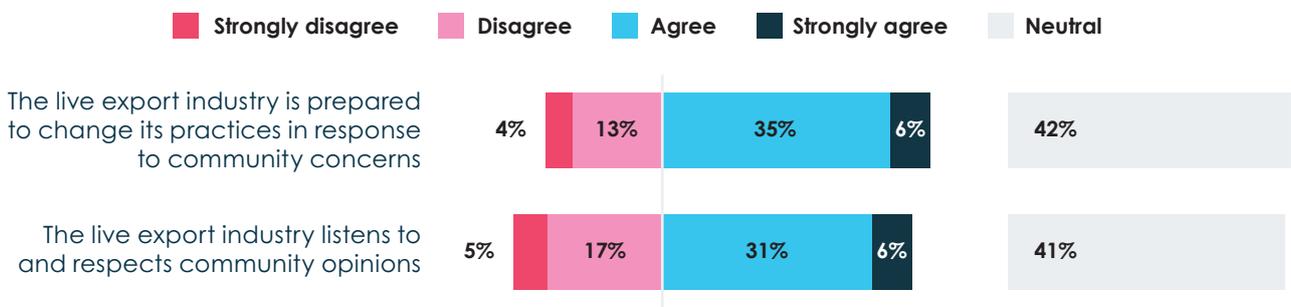


Figure 23: Distribution of responses to responsiveness measures, 2025.

Many Australians remain neutral about how responsive the live export industry is to public concern, suggesting an opportunity to make engagement efforts more visible and authentic. Building this connection is key to deepening community confidence.

Industry information and the community

This year, we have continued investigating how the Australian community perceive information and their self-rated levels of knowledge regarding the live export community, including some new questions.

This year, 11% of community members self-rated their knowledge about the live export industry in general as either 'much' or 'a great deal', the largest proportion in these categories since the research began (Figure 24). Close to a third of participants (32%) rated their level of knowledge as 'some', while 40% of community members indicated their knowledge about the industry was 'a little' (Figure 24).

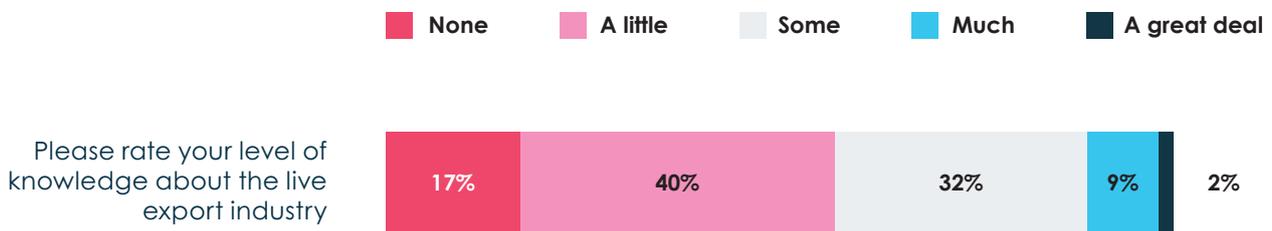


Figure 24: Distribution of responses to knowledge measure, 2025.

To better understand community knowledge and information-seeking behaviour, respondents were asked to identify the most recent source from which they had heard about the live export industry. While 13.7% of participants stated they could not recall the last place they heard about the live export industry, the top five sources for those who could were:

1. Television – news program (31.1%)
2. News website or app (13.5%)
3. Social media – e.g. Facebook, Instagram (7.9%)
4. Television – current affairs programs (7.1%)
5. Friends or family (5.7%)

These participants were then asked how much they trusted their most recent information sources. Close to half of all participants (47%) indicated they 'moderately' trusted their information source on a 1 ('not at all') to 5 ('extremely') scale, where 3 represented 'moderately'.

Digging deeper into perceptions of information, for the first time this year we asked the community to rate the statement "was the information you last heard about the live export industry positive or negative" on a 1 ('very negative') to 5 ('very positive') scale. 44% of participants rated the information they saw as either 'very negative' or 'negative', 37% rated it as 'neutral' and 19% rated it as 'positive' or 'very positive' (Figure 25). Examples of what the community said about their perceptions towards live export information and knowledge can be found on page 27.

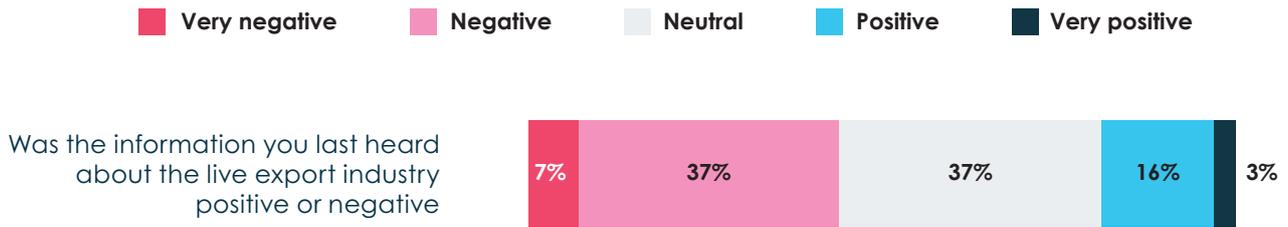


Figure 25: Distribution of responses to perceptions of information content measure, 2025.

This year built on a series of information questions first asked in last year's anchor survey. In 2025, fewer than a quarter (18.7%) of the Australian community agreed that they actively seek information about the live export industry, in line with 2024's anchor survey responses but a significant drop from the pulse survey (Figure 26). Consistent with last year's anchor and pulse surveys was 39.6% of participants who agreed with the statement "I believe the information I see is an accurate representation of the live export industry" (Figure 26). This year, community members showed the lowest level of agreement to the statement "the information I see about the live export industry often portrays it in a negative light" at 63.8%, down from 66.1% in the 2024 pulse survey and 69.8% in the 2024 anchor survey (Figure 26).

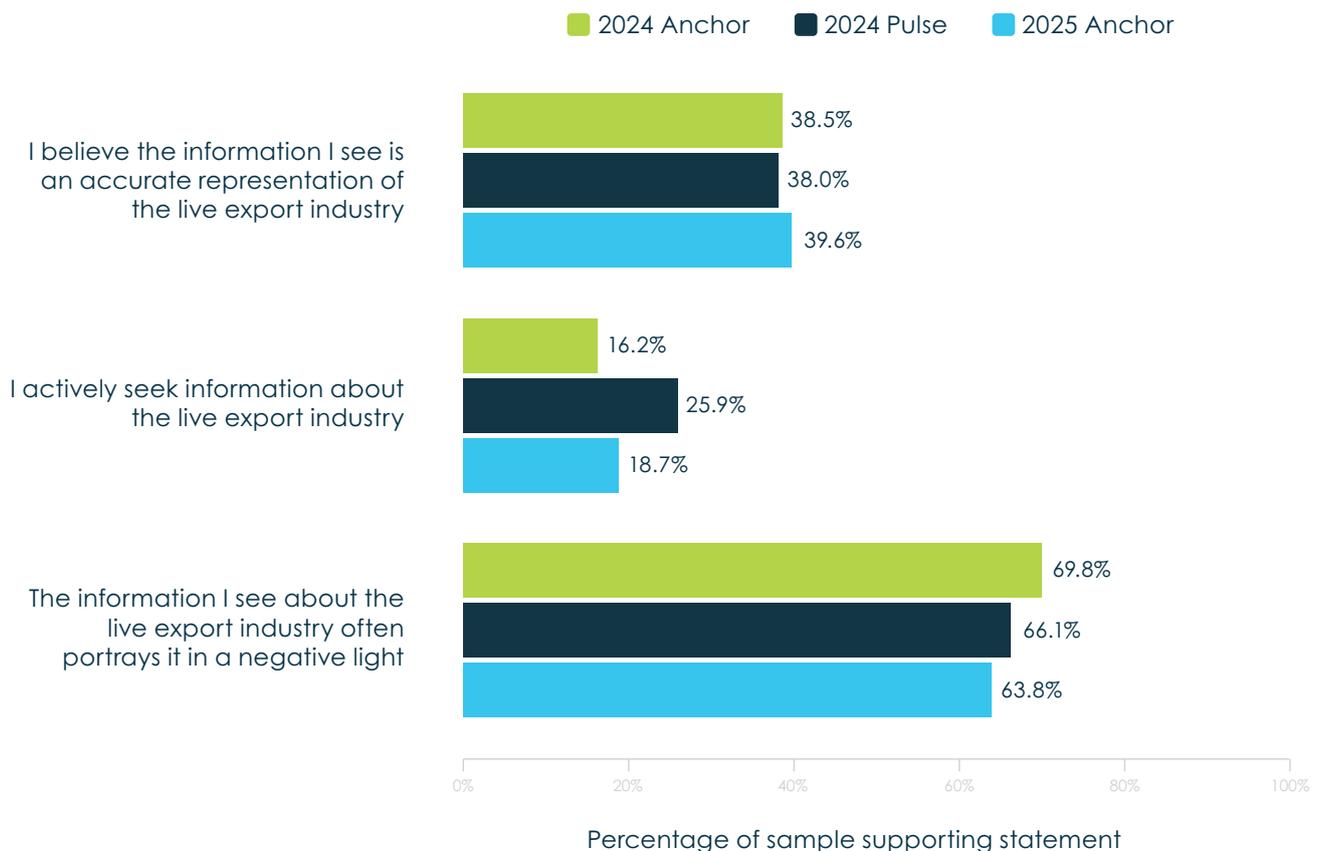


Figure 26: Proportion of agreement on information behaviour measures, 2024-2025.

The community's knowledge and perceptions of live export are shaped by the information they see. The 2025 results point to a growing appetite for balanced, accessible communication that helps Australians make informed judgments about the industry.

What did the community say about industry information?

- “ Hard to find accurate information.
– 2025 suburban survey participant.
- “ This is an issue that is not going away, we need more information as consumers so we don't jump to the wrong conclusions about this industry.
– 2025 farming region survey participant.
- “ Would like more information on how animals are treated,
– 2025 metropolitan survey participant.
- “ I only know what I hear in the media so I am very unaware of the real situation.
– 2025 metropolitan survey participant.
- “ I really don't know a whole lot about it. And I don't go out of my way to look it up. Once in a while, I will see a news story about it on TV, but nothing sticks out about what it was about or what the tone of it was.
– 2025 suburban survey participant.
- “ Unfortunately I do not know much about it but have heard negative things about it. I love animals so would like to think that appropriate regulation could ensure safe animal welfare standards. However, I do not actually know.
– 2025 non-farming region survey participant.

Benefits and costs

The live export industry has a positive impact both here in Australia and in the overseas markets it exports to. However, for some people, this is offset by areas of concerns such as animal welfare at different points in the supply chain. Understanding how Australians perceive this balance is central to revealing the value Australians place on the live export industry.

Benefits of live exports for destination markets

Australians have consistently recognised the benefits that the live export industry provides to its destination markets and the people in those countries. When asked if “the live export industry helps overseas countries ensure their citizens have access to safe sources of meat” 69.8% of participants agreed in 2025, a relatively stable result over time (Figure 27). In addition, 65% agreed that live exports support the improvement of diet and nutrition of people in destination markets (Figure 27).

Similarly, in all surveys in this program of research, more than half of participants have agreed to the statement “live animals are necessary in some overseas locations because they lack suitable refrigeration for meat” with agreement this year at 58.6% (Figure 27). Close to three quarters of Australians agreed that some overseas markets prefer fresh meat rather than frozen at 70.3% (Figure 27), a new question included this year. Since it was first asked in 2023, the measure “livestock export creates employment opportunities in foreign countries” has been stable with 65.6% agreement in 2025 (Figure 27). When asked if “the live export of animals to overseas markets supports important cultural practices in those countries” 50.9% of people agreed this year, representing an 8.3% increase from 2024 (Figure 27).

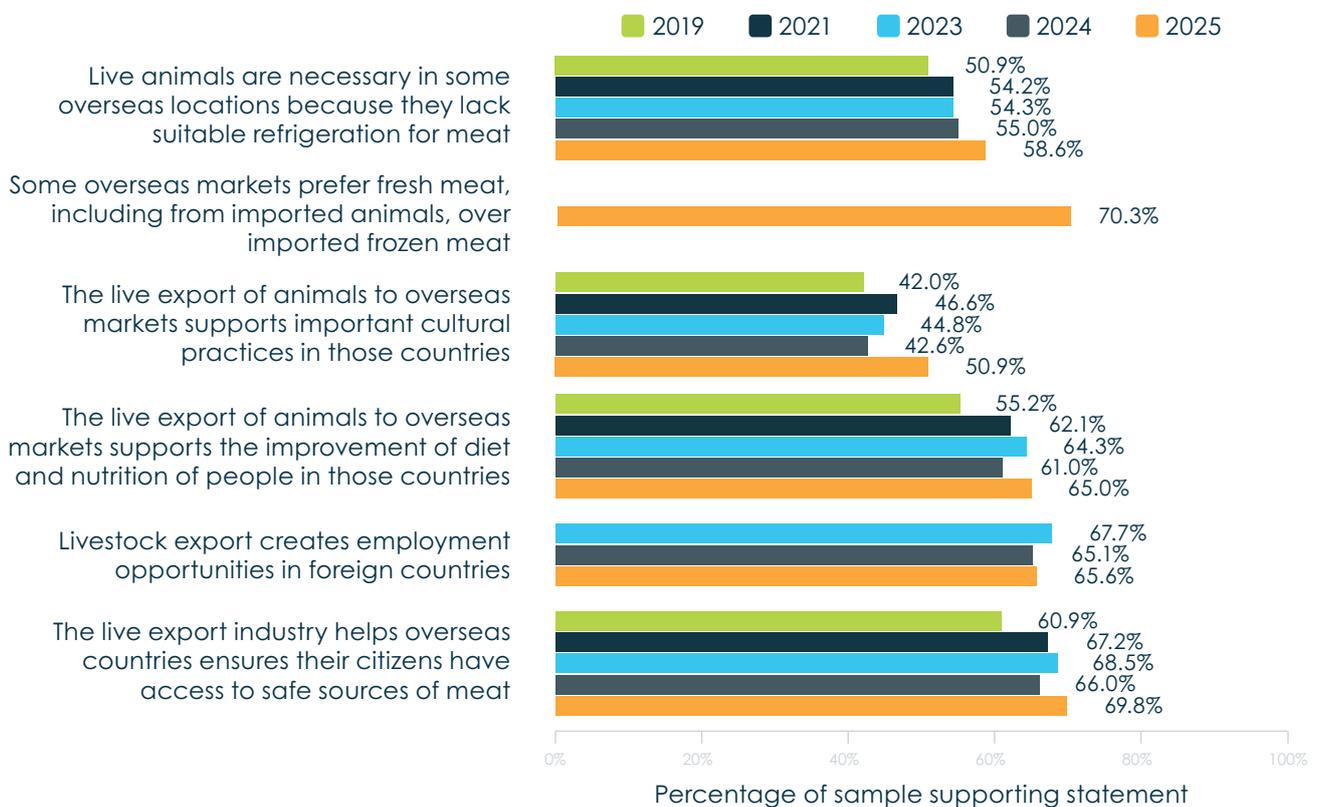


Figure 27: Proportion of agreement on benefits to destination markets measures, 2019-2025.

Economic impacts in Australia

Australians value the industry's contribution to the national economy. There has been a steady increase in agreement to the statement "without the live export industry many Australian livestock producing areas would suffer economic hardship" with 73% of participants who agreed this year (Figure 28). In line with this, 69.9% of respondents agreed that "overseas markets for livestock are an important alternative market for Australian farmers" representing a 1.3% increase from last year (Figure 28).

Similarly, more than half of participants have consistently agreed that "banning live exports from Australia would have a negative impact on our trading relationship with other countries," rising slightly from 61.8% when first included in 2024 to 63.3% this year (Figure 28).

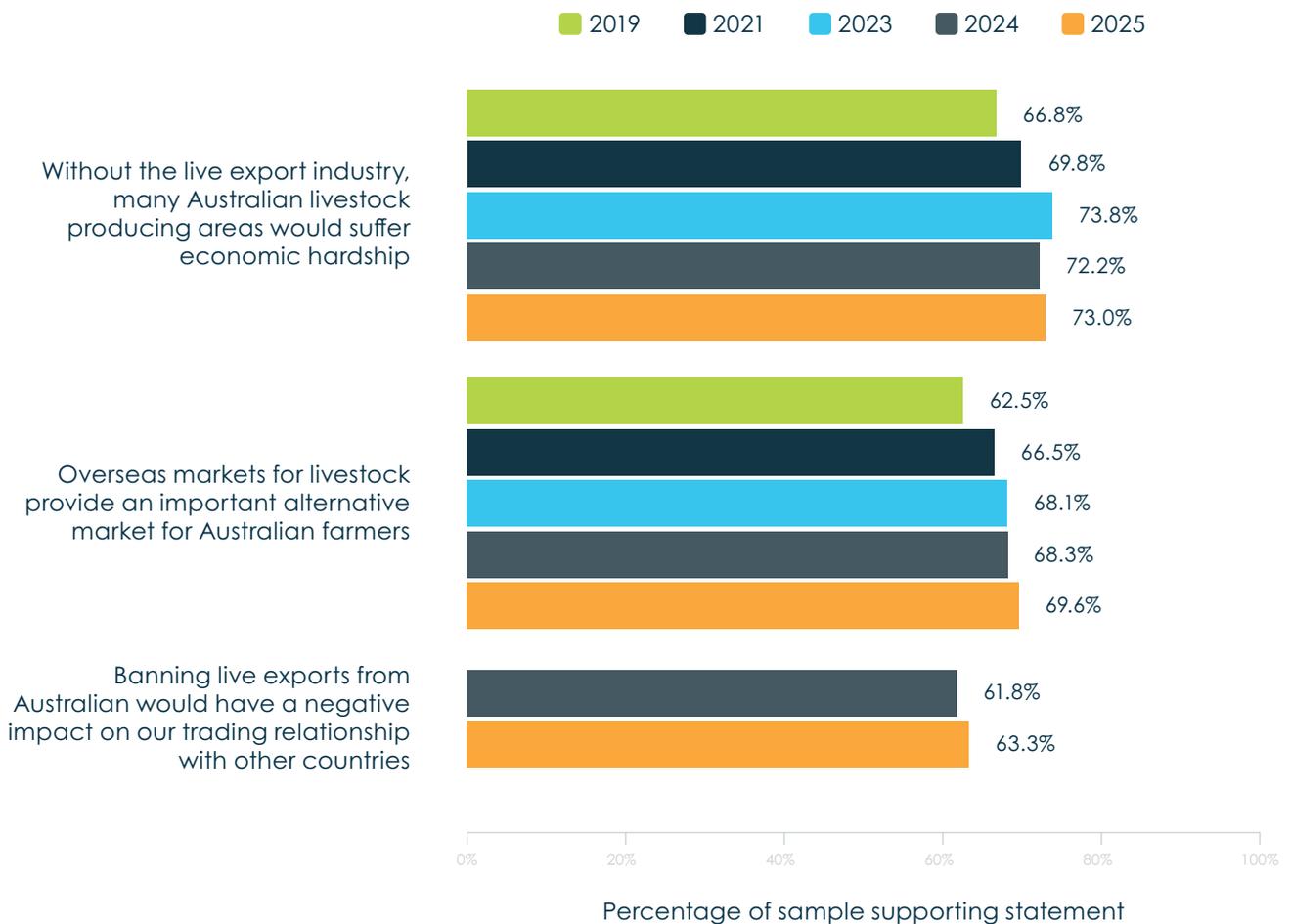


Figure 28: Proportion of agreement on benefits to destination markets measures, 2019-2025.

Value proposition of the live export industry

In each year of the research program, after answering a range of questions about the industry, Australians have been asked “as a whole, how do you feel about the costs and benefits of the live export industry in Australia”. Answers are based on a five-point scale where 1 represents ‘costs greatly outweigh the benefits’ and 5 represents ‘benefits greatly outweigh the costs’.

Around three quarters of Australians have consistently seen the benefits of the live export industry as about equal to, or higher than, the costs. This year, 39% of survey participants perceived the benefits as slightly or greatly outweighing the costs; more than a third (36%) saw the costs and benefits as about equal; and 25% believed that the costs greatly or slightly outweighed the benefits (Figure 29).

Similarly, three quarters of participants have seen the benefits of live sheep exports as about equal to, or higher than the costs since these questions were introduced. 37% of survey participants perceived the benefits to slightly or greatly outweigh the costs, while slightly more at 38% saw the costs and benefits as about equal (Figure 29).

Overall, the community were slightly more moderate regarding the cost and benefits of sheep exports than they were of general livestock this year.

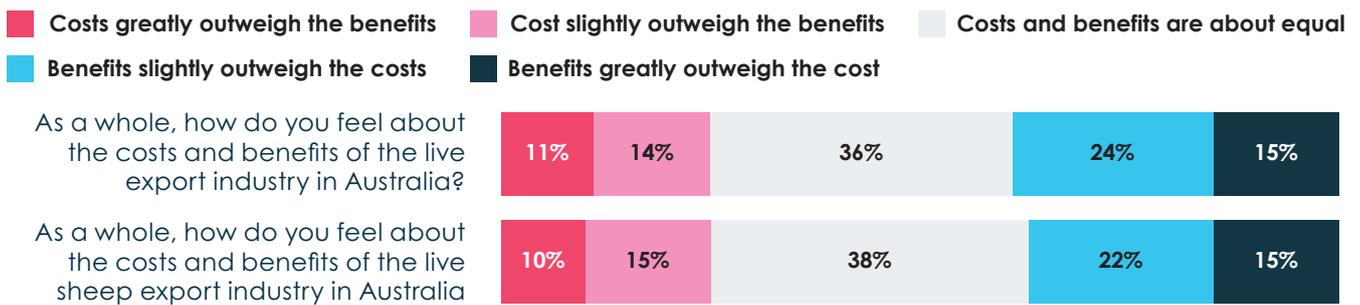


Figure 29: Distribution of response to costs vs benefit of the live export industry and live sheep export industry measures, 2025.

Understanding what matters when it comes to community attitudes is crucial. This year, we analysed and identified the drivers of costs and benefits for the industry:

- Perceptions regarding the practice of live exports
- The acceptability of the number of animal deaths
- Economic benefits to farming communities
- Regulation of the industry.

When weighing up their answers, the more the community are likely to agree with these decision points, the more likely they are to see the benefits of the live export industry as outweighing its costs.

Australians continue to acknowledge the live export industry’s economic and cultural importance, both domestically and internationally. Sustaining this recognition will depend on the industry’s ability to balance tangible benefits with clear, ongoing commitment to animal welfare and community expectations.

Conclusion

The 2025 community sentiment findings highlight both the enduring contribution of Australia's live export industry and the continued complexity of its relationship with the Australian public. Over time, trust and acceptance have strengthened from the 2019 baseline, indicating that confidence in the industry's contribution to farmers, regional economies, and international markets is consolidating.

Australians continue to hold the industry to high standards. Regulation, animal welfare, and responsiveness remain the most influential drivers of trust, confirming that confidence depends on transparent systems, credible oversight, and demonstrable care for animals. Concerns about animal treatment during transport and attitudes toward live export more broadly continue to shape acceptance, reinforcing that welfare remains central to public assessment of legitimacy.

Path modelling reinforces these patterns. When the industry is perceived as responsible, transparent, and responsive, trust and acceptance increase. In turn, perceptions of benefits (economic, social, and cultural), are strengthened. These relationships confirm the interconnectedness of the key domains of trust: humanity (care and empathy for animals and people), integrity (honesty and fairness in process), and competence (effective regulation and delivery).

Viewed over time, these survey findings suggest a relationship that is both resilient and responsive to evidence. Community attitudes are not static; they adjust in line with observed performance, transparency, and engagement. The strengthening of trust and acceptance measures, combined with renewed confidence in welfare and regulation, points to a maturing dialogue between the community and the industry.

As the industry looks to the future, the evidence provides both reassurance and direction. Reassurance, that trust can be built and maintained through consistent standards and open communication. Direction, that continued transparency, welfare assurance, and responsiveness remain critical to sustaining the industry's social licence to operate.

Beyond its findings, this program demonstrates the value of long-term, empirical monitoring in maintaining constructive relationships between industries and the communities that influence their legitimacy. By continuing to measure, understand, and act on community sentiment, the live export industry can ensure that its evolution remains aligned with the expectations and values of the Australian community.



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